



**"ARMY STRONG"**

# State of the Recruiting Market

***For MORS Workshop Personnel and National Security:  
A Quantitative Approach***

***26-28 January 2010***

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# Purpose and Agenda

- **Purpose:**

- Characterize and describe the Army recruiting market and market situation; and
- Recommend strategies and/or programs based on these critical insights and trends that enable successful recruitment and training of Army accessions.

- **Agenda:**

- Physical Environment
- Psychological Environment
- General Market Analysis
- Look Forward
- Summary

# Market Engagement Methodology

## Front End Assessment

### Environmental Assessment

- Define internal and external factors and impacts to the Army's target market
- Develop short- and long-term consolidated picture of the environment (economy, health, influencers, etc.)

### Market Assessment

- Develop temporal and spatial market perspective using various lagging and leading indicators
- Develop a regional market picture and market score for each DMA from a weighted model
- Identify key motivators/barriers

*Market Prioritization*

*Regional Market Picture*



**Strategy**

## Marketing & Communication Assessment

### Messaging Assessment

- How are we saying our key points in this market?

### Army Medium Assessment

- What we using to engage the market?

### Medium Assessment

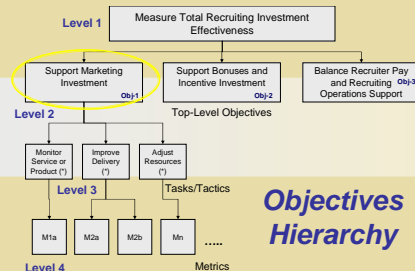
- What is the market using to get information and make informed decisions?

### Resource Assessment

- Current resources & programs in that Market

## Effects Assessment

**Expected Effects based on goals/objectives and leveraging the Data Collection Plan**



*Objectives Hierarchy*

### Assess Effects



- Assess against Mission & Operational Goals

**Refine Strategy & Define Opportunities**

- Identify:
  - Target Markets
  - Shaping Future Markets
  - Shaping Environment & Influencers Markets

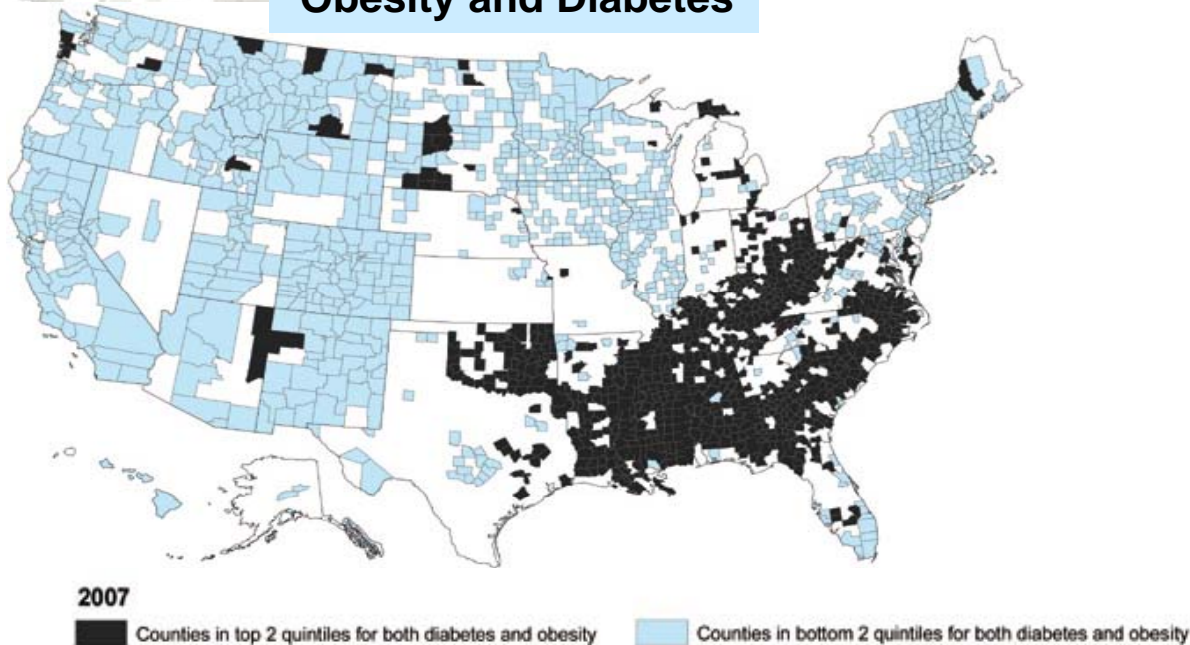
# Physical Environment

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# Health

## Obesity and Diabetes



### HEALTH: RIGHT NOW

- Over half (63%) of 20-44 year olds are overweight or obese, often with other associated health risks such as diabetes or heart disease.
- Overall the most **concentrated areas** of **obesity** are in the **mid-west and south-central regions** of the U.S... ...areas that the Army typically depends on heavily for support.
- 2008 obesity trends indicate a reduction in overweight individuals with that population shifting to the obese category.
- African Americans had a 51 percent higher prevalence of obesity, and Hispanics had 21 percent higher obesity prevalence compared with Caucasians.

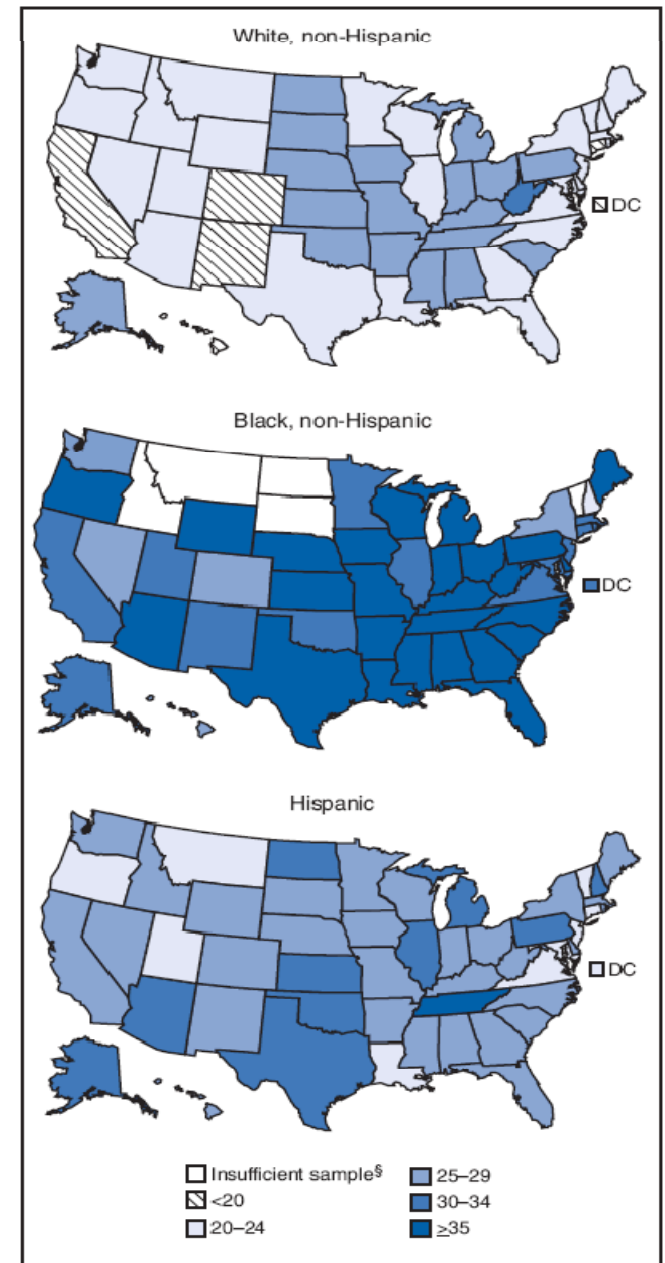
### HEALTH: LOOKING AHEAD 2020

- The higher prevalence of African American and Hispanic obesity paired with the projected increase in those population groups indicates that obesity rates may not decrease.

Source: [www.cdc.gov](http://www.cdc.gov)

## % Obese Adults by Race 2006-2008

Source: Behavioral Risk Factor Surveillance System Surveys, United States, 06-08)





# Morality

## MORALITY: RIGHT NOW

- Juvenile arrests have **declined 2.9 %** since 2005; however, individuals under the age of 25 accounted for the following:
  - **50.4% of all arrests for murder**
  - **64.7 % of all arrests for robbery**
  - **45.3% of all arrests for violent crimes**
  - **54.6% of all arrests for property crimes**
- African American (38%) and Hispanic (36%) youth ages 12-18 report having the most gang related exposure at school.
- While juvenile crime increased significantly in the 90's, population growth was also the greatest in census history (even greater than the Post WWII baby boom). With that said, juvenile court cases have decreased significantly since 2000.
- In 2006 49.7% of homes were attributed to married couples, and 12.5% were single mother homes.

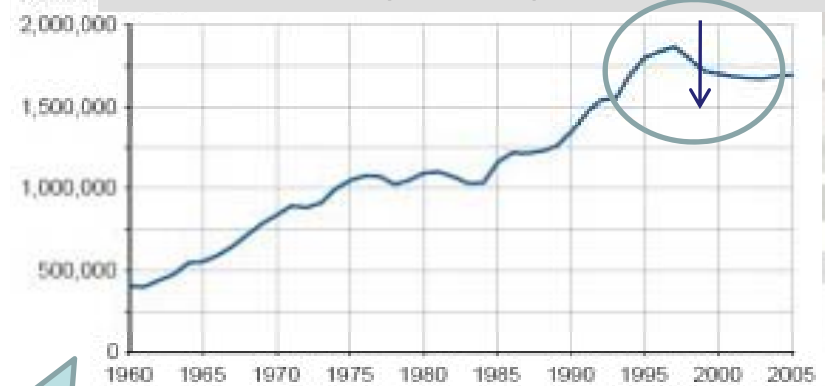
Internet citation: OJJDP

<http://ojjdp.ncjrs.gov/ojstatbb/default.asp>

## MORALITY: LOOKING AHEAD 2020

- Young adults in minority groups will continue to be at a greater risk for morality related barriers.
- The preeminence of single parent and dual-earner families will increase the need for communities to become increasingly involved in supporting the nation's youth.

Number of Juvenile Court Delinquency Cases (1960-2005)



Good News Story

Population, 1960-2000

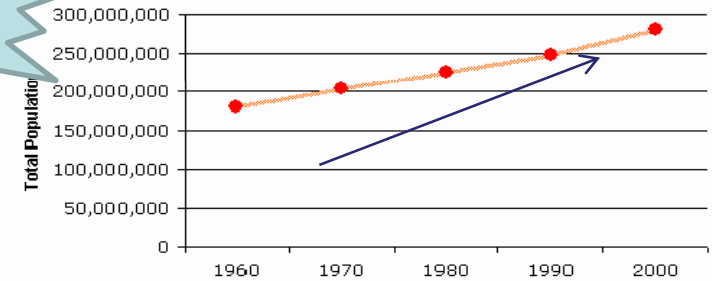
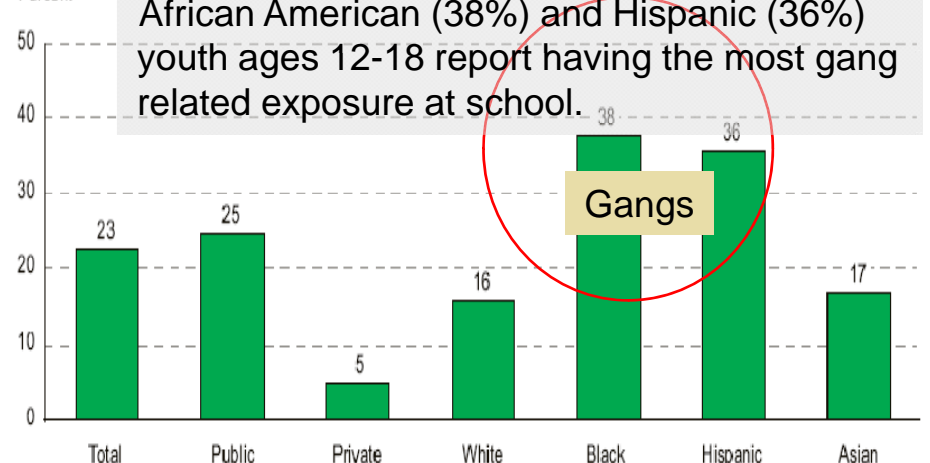


Figure 8.1. Percentage of students ages 12-18 who reported that gangs were present at school during the school year, by school sector and race/ethnicity: 2007

Percent



# Environment

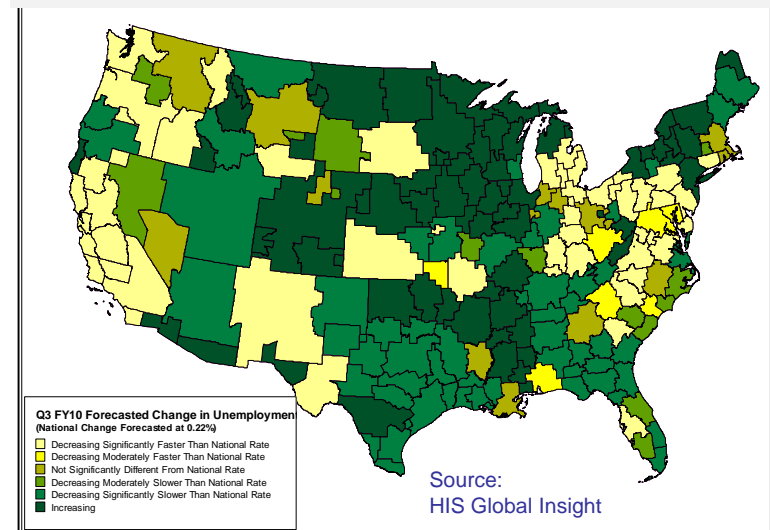
## Economic Summary

- **The Economy (FY10):**
  - Economy is center stage for FY11 with modest recovery.
  - Unemployment peak in Feb 2010.
  - The first job markets to come back: health & educational services.
  - Youth employment will be last to recover as industry looks for highly qualified and more experienced workers.
- **The Economy (FY11 and beyond):**
  - Employment growth to occur primarily in (1) management, scientific, and technical consulting, (2) computer systems design, and (3) systems design.
  - Almost 50% of the fastest growing occupations will require a bachelor's degree or higher.
  - Moving toward 2018:
    - Labor force more diverse with Asians projected to increase by 29.8%, African American by 14.1% and Hispanics by 33.1%.
    - Postsecondary degrees to account for 50% of all new jobs and 33% of job openings.

- **Education:**

- The top challenge among college students is financing their education.
- The federal education budget providing nearly fifty percent less in financial aid than students enjoyed in 05-06.
- The cost of post high school education continues to go up in every category.

### FY10 3<sup>rd</sup>/4<sup>th</sup> Quarter Unemployment Change Projections





# Psychological Environment

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## Top 5 Attitudes:

Caucasian	African American	Hispanic
If I work hard enough, I can accomplish just about anything.	Maintaining my self-respect is important to me.	If I work hard enough, I can accomplish just about anything.
Maintaining my self-respect is important to me.	If I work hard enough, I can accomplish just about anything.	What matters most in the next few years is finding something to do that I really believe in.
It's essential to have good computer skills to succeed in today's world.	I want to be somebody.	Maintaining my self-respect is important to me.
I want to be somebody.	What matters most in the next few years is developing a good plan for my life.	I want to be somebody.
What matters most in the next few years is doing something I can be really proud of.	Being financially successful in the long term is my top priority.	What matters most in the next few years is doing something I can be really proud of.

## Top 5 Motivators:

Caucasian	African American	Hispanic
Get help paying for a college education.	Get help paying for a college education.	The opportunity to travel and see the world.
The opportunity to travel and see the world.	The opportunity to travel and see the world.	It offers excellent benefits, such as health care, retirement, and vacation.
It offers excellent benefits, such as health care, retirement, and vacation.	Have exciting experiences and adventures.	Have exciting experiences and adventures.
The military is an honorable occupation.	It offers excellent benefits, such as health care, retirement, and vacation.	Get help paying for a college education.
Gain management and leadership experience.	Gain management and leadership experience.	<ul style="list-style-type: none"> <li>- The military is an honorable occupation.</li> <li>- Gain management and leadership experience.</li> <li>- I'd learn skills that would help me get a good job when I get out.</li> </ul>

## Top 5 Barriers:

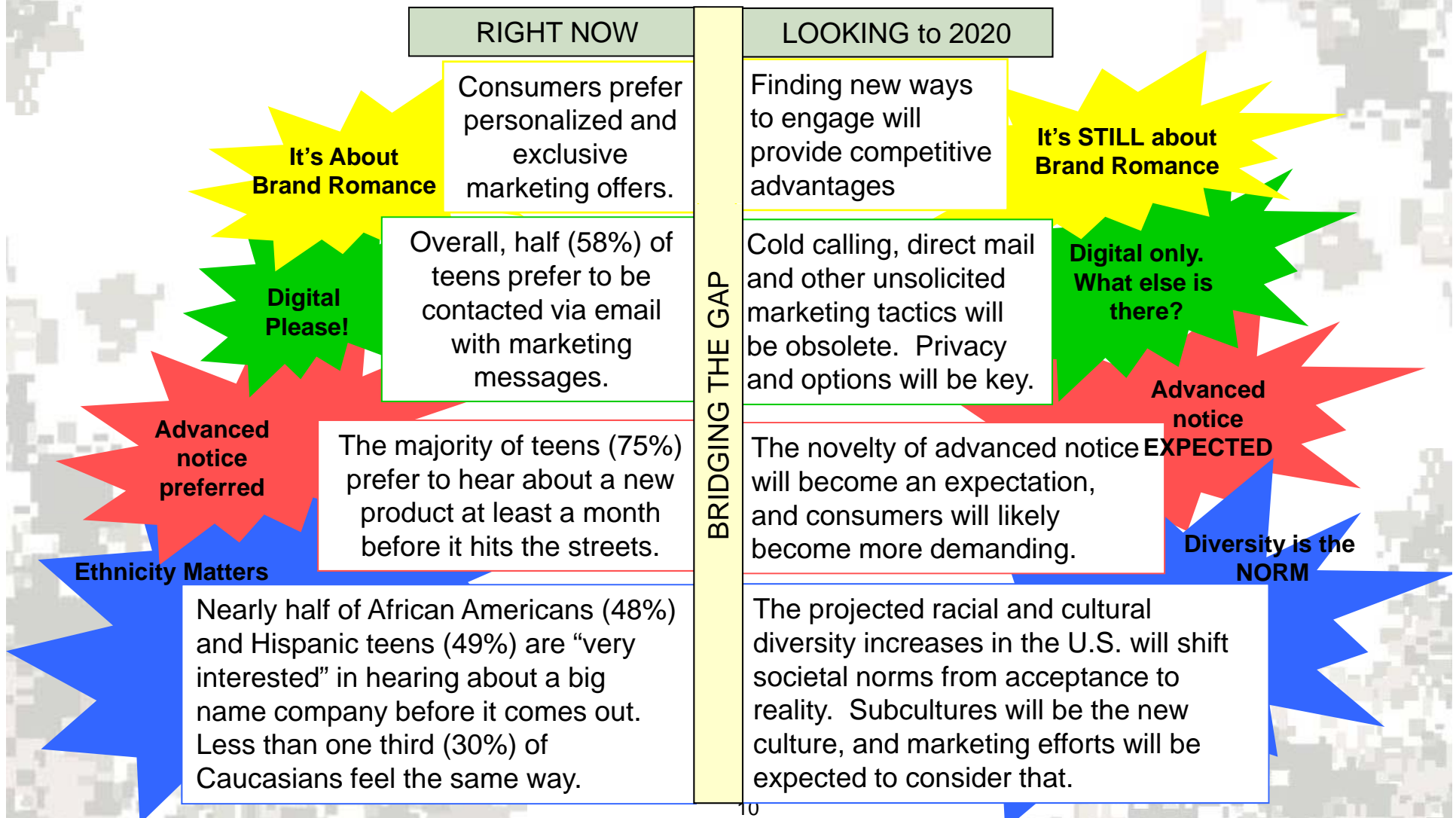
Caucasian	African American	Hispanic
I might be killed in combat.	There's a good chance that I'd end up in combat.	I have other career interests.
I have other career interests.	It would be hard on my family members.	I might be killed in combat.
The long time commitment required.	The long time commitment required.	I'd have to put my life on hold.
I might hate it once I got in and then be stuck.	I'd miss my home and family.	I'd miss my home and family.
I'd have to put my life on hold.	I have other career interests.	I might hate it once I got in and then be stuck.

**Similarities are greater than differences between race/ethnic groups**

Source: GfK Image & Equity Study, 2008, 17-24 year old respondents

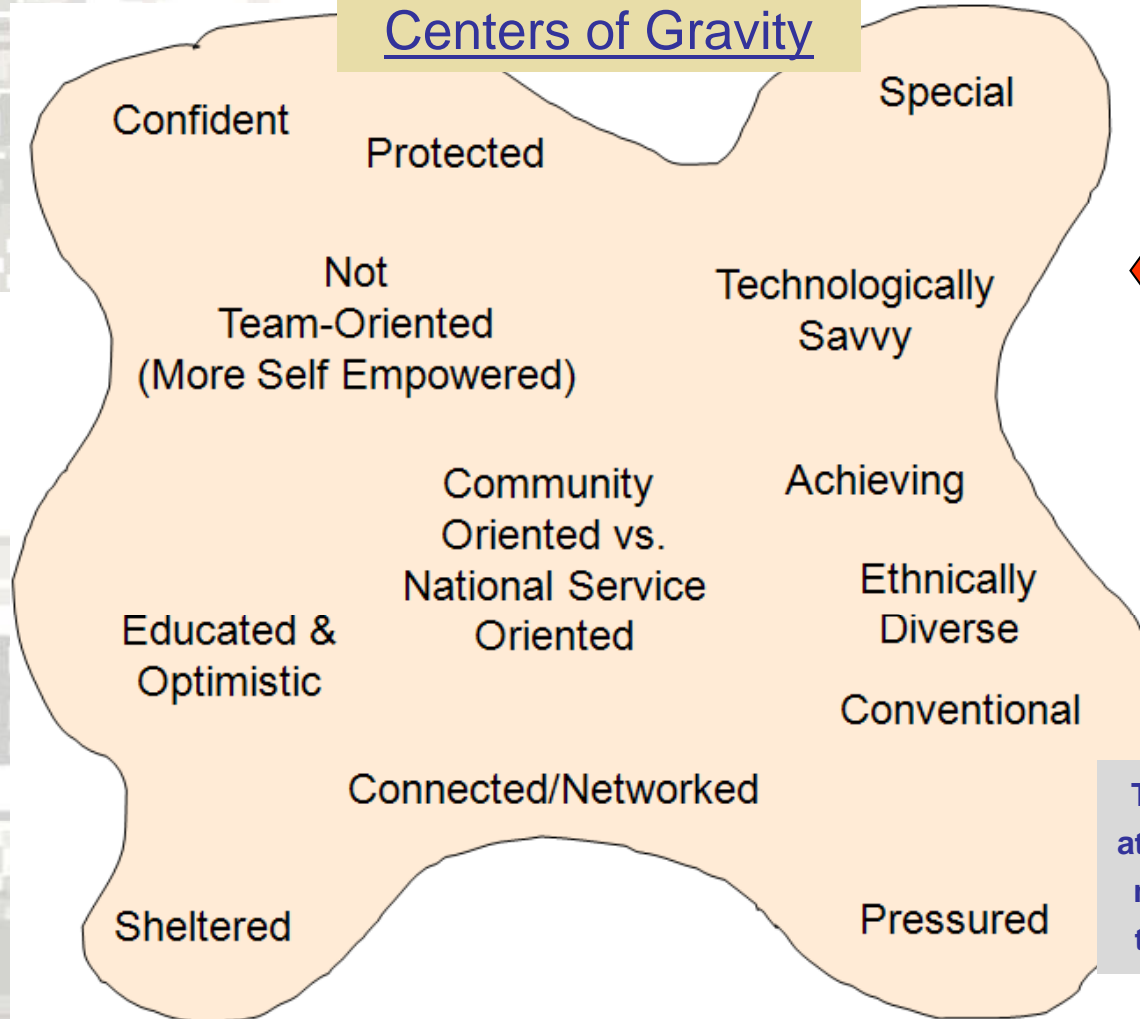
# Technology & Communication

Technology is already prevalent and still growing at an exponential rate. The preferences and demands that accompany such growth will greatly impact the way relationships are formed between consumers and corporate America as time goes on. Organizations that embrace change and spend time developing relationships with the youth population right now will effectively bridge the gap between the present and the future.



# Important Characteristics of Millennials

## Millennial Centers of Gravity



## Environmental Pressures

Family  
Obesity & Health  
Economy

Post-Education  
Education Costs

## Army Pressures

Operational Tempo

Army Culture  
BRAC  
Deployments

The youth values and attitudes are somewhat misaligned with what the Army can deliver.

“Growing importance placed on pursuing personal hobbies and experiences, building deeper local relationships, and contributing to the advancement of one’s community”.

# General Market Analysis

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# Active Army Enlistment Cohort Profiles

	2000 (Pre 9-11)	2005 (Msn Fail)	2009 (Recession)
Male	77.2%	81.8%	82.6%
Median Age	19.3	19.9	20.4
African American	22.8% (P-P 1.63)	13.5% (P-P 0.95)	17.6% (P-P 1.18)
Hispanic	10.4% (P-P 0.85)	13.3% (P-P 1.07)	12.8% (P-P 0.96)
API	0.6% (P-P 0.12)	4.2% (P-P 0.89)	5.5% (P-P 1.12)
Ave Median HH Inc	\$46,692	\$49,214	\$50,494
Ave Population Density Centile (low to high density)	45.4	44.1	43.6
Pct Armed Forces in Home Neighborhood	3.46%	1.47%	1.45%
Most Important Reasons to Enlist	-Plan for Future -Skills Training -Something to be Proud Of	-Something to be Proud Of -Make A Difference -Develop My Potential	-Something to be Proud Of -Develop My Potential -Defend & Serve Country
Most Significant Barriers	-Military Lifestyle - Other Career Interests --Long Commitment	-Getting Everything Promised -Military Lifestyle - Other Career Interests	-Getting Everything Promised -Education Plans -Military Lifestyle
1 <sup>st</sup> Interested in Military at 14 yrs old or less	27.9%	36.1%	46.6%
Before joining was not working, but looking for work	4.8%	9.7%	9.4%
HSDG Only	76.3%	68.5%	70.8%
GED	11.8%	14.8%	6.9%
College Diploma	3.9%	5.7%	8.4%
Test Score Cat A	64.3%	64.7%	65.8%
Test Score Cat IV	0.8%	5.3%	0.4%
Average GT	105.4	106.0	106.6
Average AFQT	58.5	59.1	60.2
Married	14.1%	13.9%	17.0%
>1 Dependent	9.1%	9.1%	11.7%
Average Bonus	\$ 2,752	\$ 7,322	\$ 9,263
Point of Sale (FSR2S)	N/A	1.4%	66.2%
PaYS Program Option	0.01%	14.6%	21.3%
Total Contracts	86,836	69,858	91,704

As median age has slightly increased over time, so has the number of dependents. The Army must be prepared to continue its focus on Army family services.

The Army enlistment cohort continues to improve in race/ethnic diversity that is representative of the population from which we recruit.

Enlistees are increasingly skewing toward suburban and rural backgrounds. If this continues, it may be more difficult in the future to maintain representative Hispanic and API diversity in the cohorts.

The percentage of enlistees who first became interested in the military at a young age has dramatically increased. Army should continue to seek communications mediums that sustain youth involvement and interest, particularly in areas with fewer active duty military personnel.

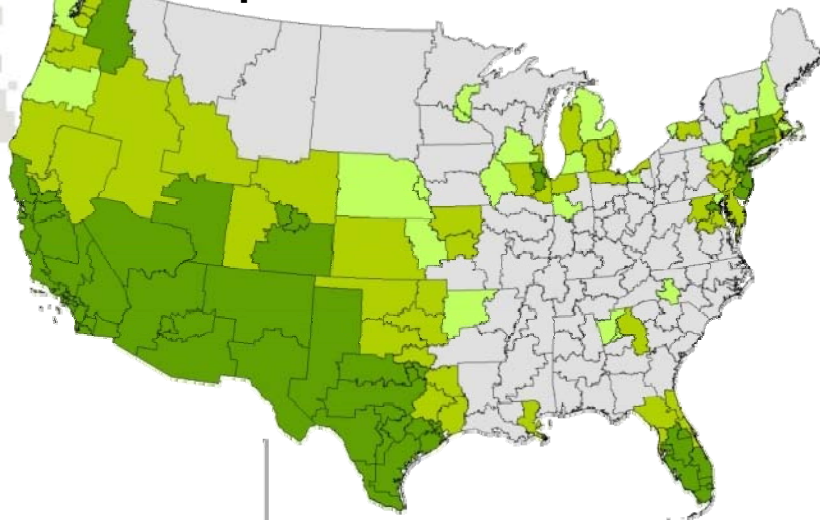
Changes to the Army offer (i.e. PaYS) and recruiting process (i.e. FSR2S) are very well received, based on the dramatic growth experienced by these programs.

# Who Serves in Your Army

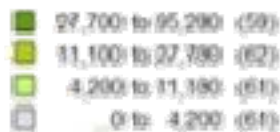
## Demographic Characteristics

### Hispanic

#### Population Distribution

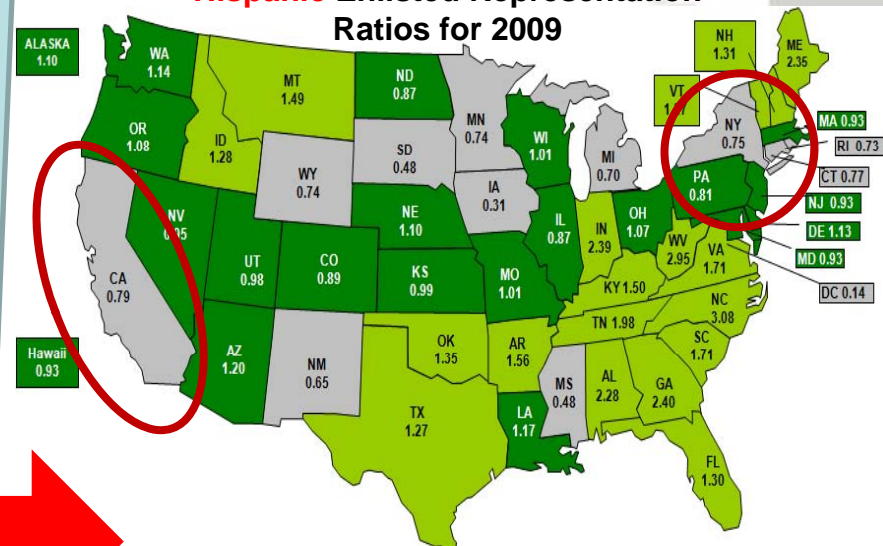


African American Youth Population (2009)  
(17-24 Yr Old, Qualified Military Available)

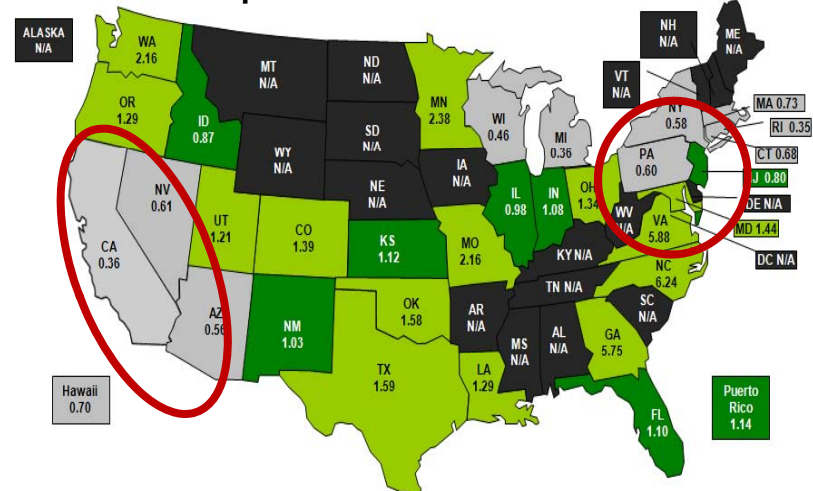


- Over- or equal-representation in the [south](#).
- Under-representation for African American population in the [northeast](#), and [west](#) areas; where quality exists also.
- Hispanic population is the largest growing population; targeting, engagement and affecting their centers of gravity is critical for FY11 and beyond.

#### Hispanic Enlisted Representation Ratios for 2009



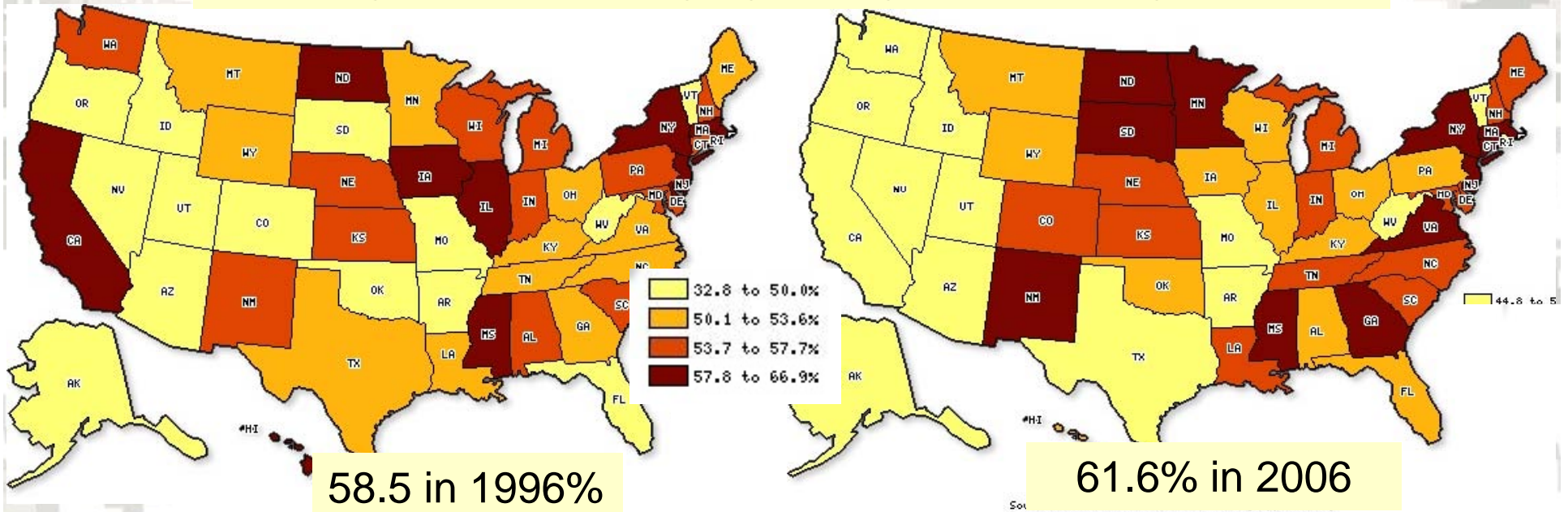
#### Hispanic ROTC Commissions Representation Ratios 2007-2009



Source: USAAC Data Warehouse Historical Commissions Table; Woods & Poole  
2008 HS Senior & College Enrolled Population Estimates

# Education...National

## Rates of High School Graduates going to College Directly from High School



### EDUCATION: RIGHT NOW

1. Nearly all (96%) of teens plan on furthering their studies after high school, & 4 out of 5 teens believe it is “[really difficult](#)” to get ahead in life [without a college education](#). (TRU 2009)
2. The ability for high school graduates to attend college immediately following high school is still limited despite aspirations.
3. States have experienced a significant shift in college bound youth in the past decade.

### EDUCATION: LOOKING AHEAD 2020

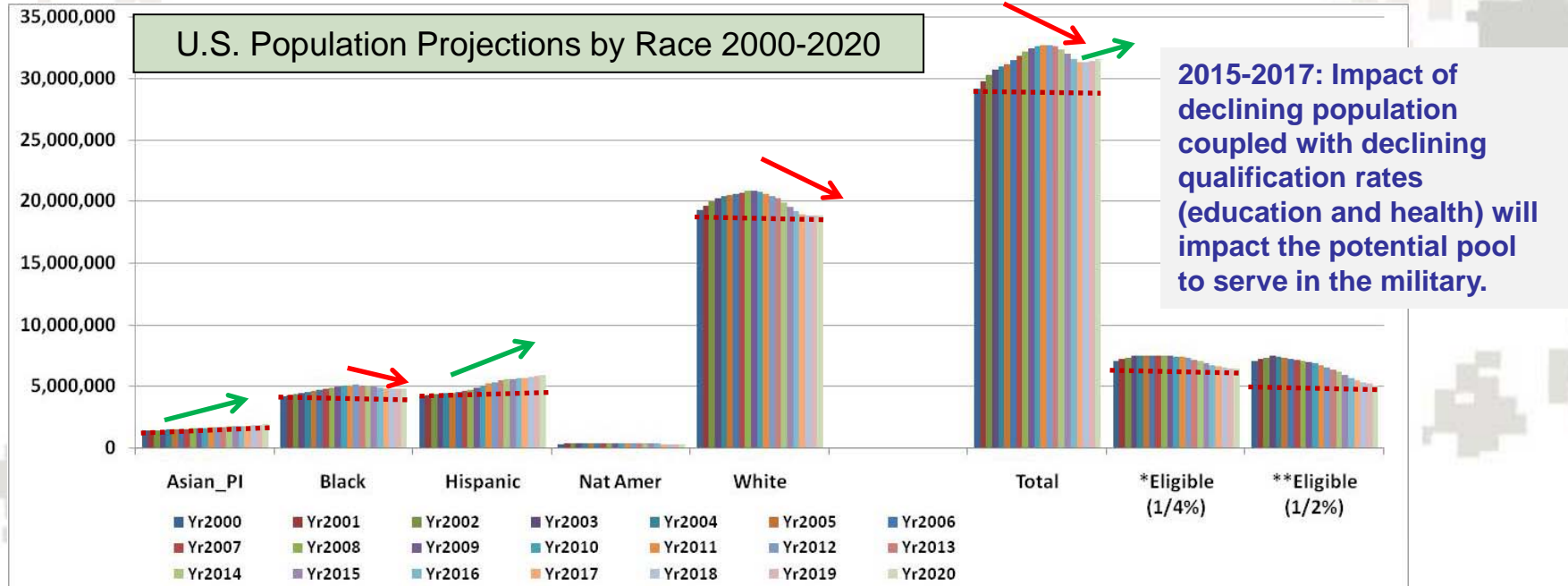
1. More and more entry level jobs will require a college degree. Providing resources for high school graduates to get their college educations will become increasingly important.
2. Supporting [STEM](#) programs in-stride with other initiatives and community activities will continue to develop the [aptitude](#) and [interests of the youth population](#) while ensuring that QMA remains stable.
3. More individuals will aspire to obtain careers in science and technology as society becomes increasingly dependent on technology-related resources.

SOURCES: U.S. Dept. of Ed., Institute of Ed. Sciences, National Center for Ed. Statistics, National Assessment of Ed. Progress (NAEP), 1986 and 2008 Long-Term Trend Mathematics Assessments. DoD Jun 2008 Youth Poll; JAMRS Youth Propensity Update (10/08); GfK Custom Research Inc. U.S. Military Image Study A Topline Comparison of Age Cohorts (2/08)



# Looking Ahead to 2020

Overall population growth rates will decline and the U.S. will shift into an aging population with minority groups experiencing the most growth.



## SO WHAT?

- Developed countries such as the U.S. expect to see overall population declines due to aging populations and low fertility rates over the coming decades.
- Decreasing immigrants and the children they will have will allow the U.S. little or no overall population growth by 2020.
- The population growth expected in minority groups will not be enough to offset the overall decline, and present compounding health and educational challenges.
- Data from the Mexican government (ENOE) shows a **63% decline** in the number of **persons leaving Mexico** from 2007 to 2009 (547,000 in February 07 to 203,000 in February 09).
- 2008 Data from the Department of Homeland Security (Border Patrol) show a strong decline in the number of persons trying to enter the U.S. illegally— **the lowest level since 1973, and 40% lower than 2004.**

# Summary

- Environment:
  - Several physical environment factors (health, education pressures, education costs, economy) will continue to impact youth and parental decisions regarding military service. Currently several of these factors are favorable for recruiting but will eventually swing back to unfavorable especially as the economy improves.
  - The youth values and attitudes are somewhat misaligned with what the Army can deliver.
- Market:
  - General population and the Qualified Military Population will shrink in the next few years impacting recruiting and the quality of the recruiting pool.
  - The Hispanic and African American youth cohorts each have 2 geographic sets of Centers of Gravity.
    - Hispanic: 1) South West (LA, Houston, San Antonio, & San Francisco), and 2) East Coast (NYC & Miami)
    - African American: 1) South West (LA), 2) North East (NYC, Philadelphia, & Washington DC), 3) North Mid-West (Chicago & Detroit), and 4) South East (Atlanta)
  - Attitudinal - Cultural biases for and against Military Service
    - Vary Significantly by Market Area for both Hispanics and African Americans

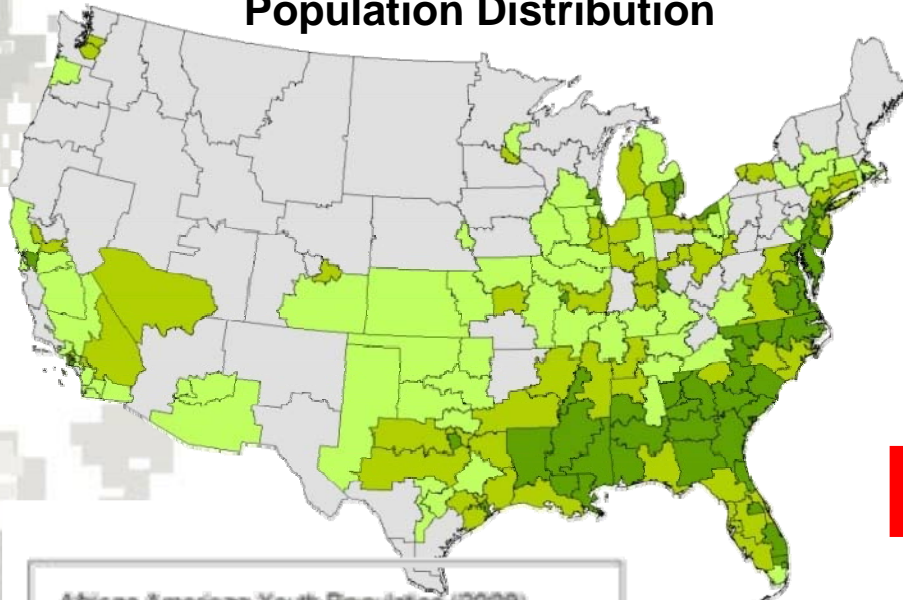


# Backup

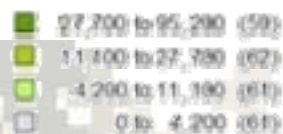
# Who Serves in Your Army

## Demographic Characteristics

### African-American Population Distribution

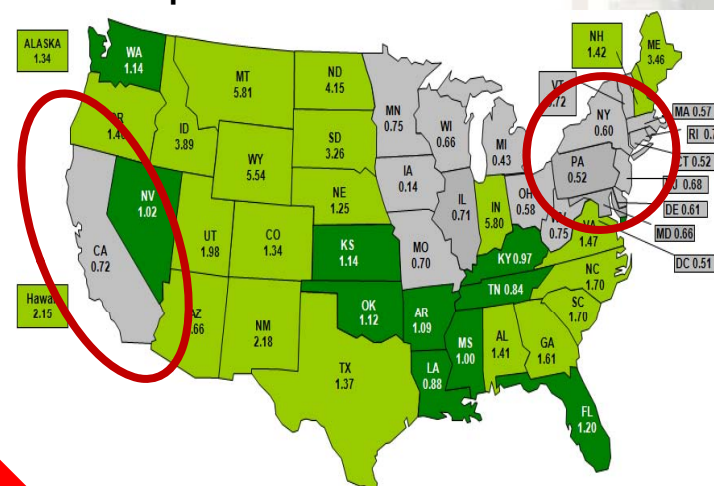


African American Youth Population (2009)  
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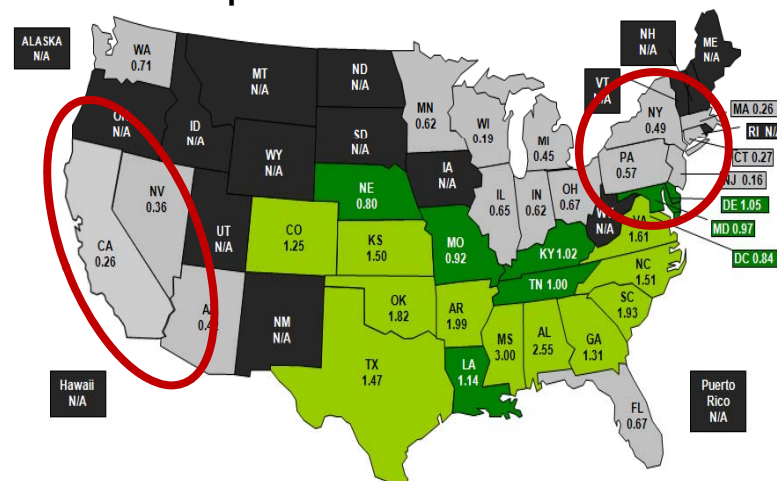


- Summary:
  - Over- or equal-representation in the south.
  - Under-representation for African American population in the northeast, north-central and west areas.
- Targeting and segmentation of the population is critical in FY11 and beyond.

### African-American Enlisted Representation Ratios for 2009



### African American ROTC Commissions Representation Ratios 2007-2009



Source: USAAC Data Warehouse Historical Commissions Table; Woods & Poole 2008 HS Senior & College Enrolled Population Estimates

# Economy

Despite current economic struggles, the future poses a new set of unrelated economic challenges primarily related to demographic shifts. Aging population, declining birth rates, and growing ethnic diversity will likely change the spending behavior of consumers in the U.S. This shift threatens to greatly reduce the pool of qualified prospects, while also creating marketing challenges to effectively communicate with minority markets.

1. Aging populations place stress on an economy by lowering the size of the [skilled and experienced] labor force, and lowering overall economic productivity.
2. Starting in the next two years (until 2030) the number of persons who reach the retirement age of 66 will increase by over 100,000 each year throughout the Baby Boom retirement years. For many of the early years in that period, the number of persons who reach the age of 19 and enter the labor force will actually decline by more than 40,000 per year for the next decade.
3. The costs incurred by the U.S. to care for a large number of retirees will have a severe economic impact as Social Security will begin to run at a deficit in about eight years and will completely deplete its trust fund by 2041. At the current rate, Medicare and Medicaid will deplete their trust funds in only about ten years. Combined this cost could be the largest component of all U.S. government spending by 2030.
4. From now until 2020, projections show that the Struggling and Lower Mid groups will be the only ones to gain share, with the Struggling group growing by over 10%. The lower affluence groups will grow at the expense of all other groups. By 2050, the projections show that the Struggling group will have grown in size by nearly 70%, pulling households from all other affluence groups—particularly those in the middle.

## SO WHAT?

Learning how to identify and market to ethnically diverse groups and specialized audiences efficiently will create new opportunity. Leveraging the aging population to advocate for the Army and become community supporters will also ensure minority groups have a plethora of resources to shape decision making.

Source: The Nielsen Company, U.S. Census Bureau

## Five Affluence Groups

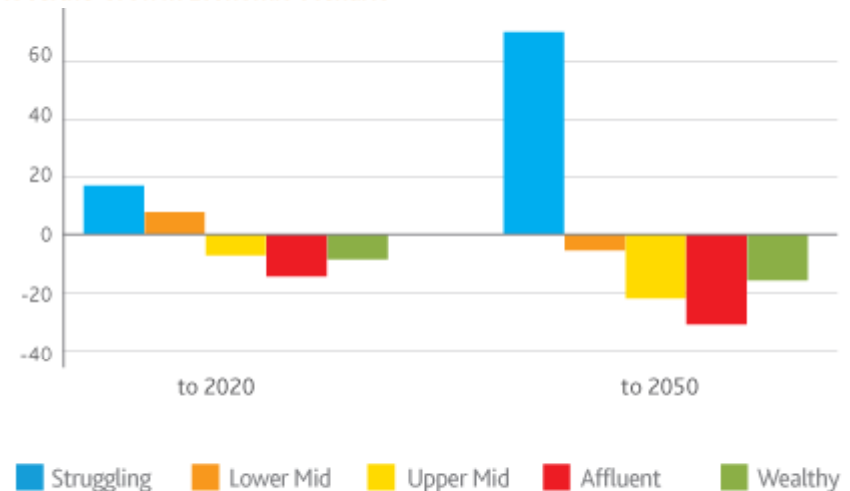
Projections using household income-to-poverty ratio

Groups	Struggling	Lower Mid	Upper Mid	Affluent	Wealthy
IPR Ranges–	<1.5	1.50-2.75	2.75-4.00	4.00-6.25	>6.25
Median HHI–	\$12,201	\$30,402	\$48,501	\$72,395	\$132,487
% of HHs–	19.7%	20.9%	18.4%	20.9%	20.2%

Source: The Nielsen Company, U.S. Census Bureau

## How Affluent Groups Will Change in the Future

Moderate Growth Economic Scenario



Source: The Nielsen Company, U.S. Census Bureau



# Education

Today, most prospects and influencers see going to college as necessary for future success. 62% of high school students actually went to college right after high school in 2006 (a 6% increase from 2004).

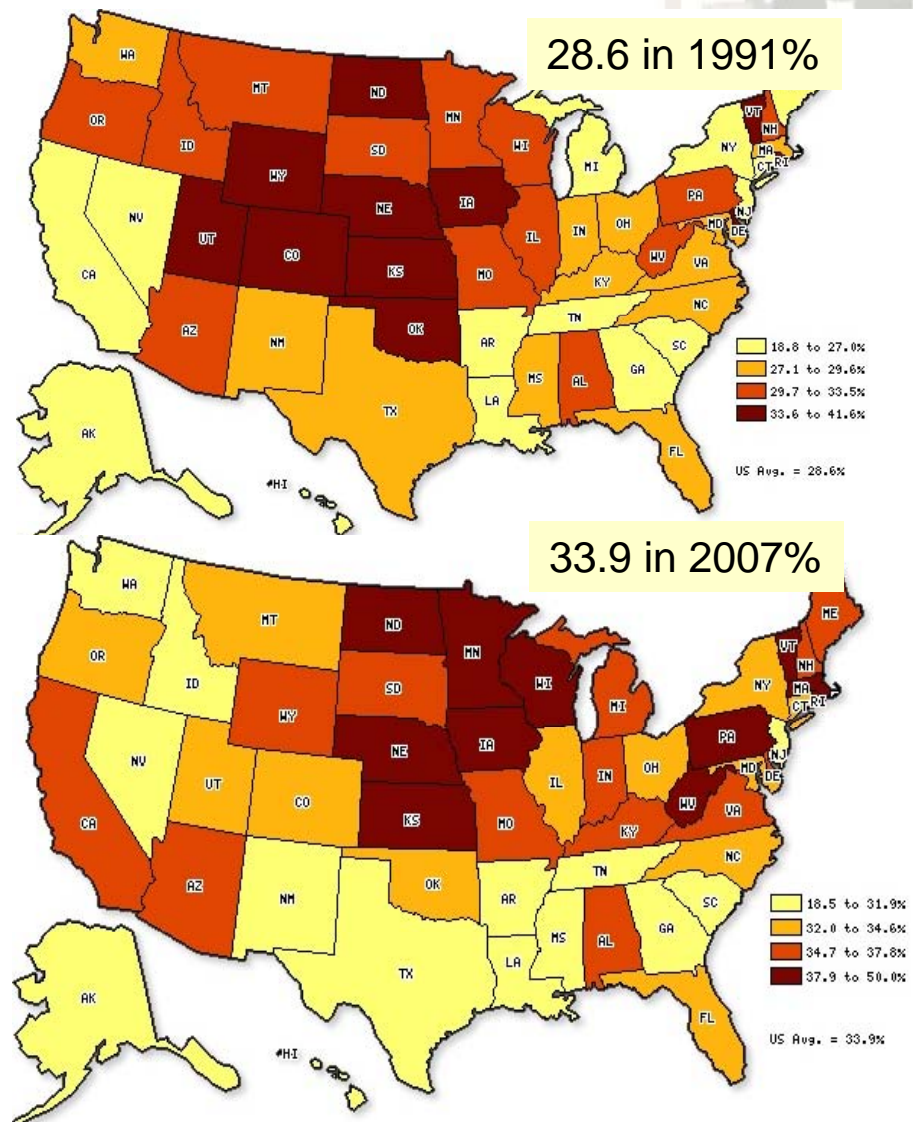
## EDUCATION: RIGHT NOW

1. Nearly all (96%) of teens plan on furthering their studies after high school, & 4 out of 5 teens believe it is “**really difficult**” to get ahead in life **without a college education**.
2. More 13-year olds are choosing advanced mathematics classes such as pre-algebra or algebra in 2008 than any other mathematics course.
3. There has been an overall increase in the percent of college enrolled by state, although there has also been a considerable shift in states. States with high percentages serve more of their young adults in postsecondary education and tend to do a better job preparing kids in high school for participation and success in college

## EDUCATION: LOOKING AHEAD 2020

1. More individuals will attend college right out of high school than ever before. It will become critical for the Army to overcome the perception that service and education are mutually exclusive.
2. Supporting **STEM** programs in-stride with other initiatives and community activities will continue to develop the **aptitude** and **interests of the youth population** while ensure the Army has qualified individuals to serve in the future.
3. More individuals will aspire to obtain careers in science and technology as society becomes increasingly dependent. [www.higheredinfo.org](http://www.higheredinfo.org)

## Percent Enrolled in College (18-24)



# Center of Gravity

## Accession Definition

### Center of Gravity (Operational Application)

1. That point where the enemy is most vulnerable and the point where an attack will have the best chance of being decisive.<sup>1</sup>
2. CoG focuses on achieving a specific effect; the total collapse of the enemy. CoG is an effects-based approach rather than a capabilities-based one.
  - What is the effect we want to achieve?
  - What are the actions we should take to achieve it?

### Center of Gravity (Market Populations)

- The representation of three competing dependent objectives:
    - Precision (Diversity)
      - f(race/ethnic, gender, geography, academic....)
    - Volume
      - f(missions)
    - Quality
      - f(%HSDG, %TSC, Waivers, ....)
- 1
- 2
- The representation of the key 'centers of power' impacting military service or the recommendation for service:
    - Geographic
    - Attitudinal (motivators & barriers)
    - Influencers
    - Economy
    - Health
    - Cultural, Social and Political
    - Consumption of information/communications

1. John A. Warden III, *The Air Campaign: Planning for Combat* (Washington, D.C.: National Defense University Press, 1988), 9; and idem, "The Enemy as a System," *Airpower Journal* 9, no. 1 (spring 1995): 40–55.